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Instructional Guide to the Welcome Page for Substance Use Providers

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For Substance Use Providers

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I. Introduction

The CYBER Welcome Page has been designed to assist substance use providers with managing their day-to-day work.

The Welcome Page is similar to a reporting dashboard area that the user first comes to when they log into the system, and can be accessed anytime during a logged in session. It allows users to have quick access to information that is typically used to set work priorities such as checking treatment plans or assessments that are in progress or not yet approved, reviewing expiring authorizations for services as well as locating information on youth that are pending admission into a program.

*Please note that, in some instances, the information that populates the Welcome Page is *user* specific, not agency specific. In order to see user specific information, users need to be opened on the Provider tab of a youth's Face Sheet; this assigns the user to the youth and the data within the youth's record can then be reported on the Welcome Page (see Using the Provider Tab of the Face Sheet). Also to note is that some functionality is dependent upon a user's security set-up; if a user does not have access to the appropriate or necessary information on their Welcome Page, they should contact either their Security Administrator or the Customer Service Request Form at www.performcarenj.org/ServiceDesk.

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II. Accessing CYBER

Users must first log into CYBER with their Username and Password. CYBER can be accessed via the PerformCare website – www.performcarenj.org . The link is available at the top and bottom of the main page.
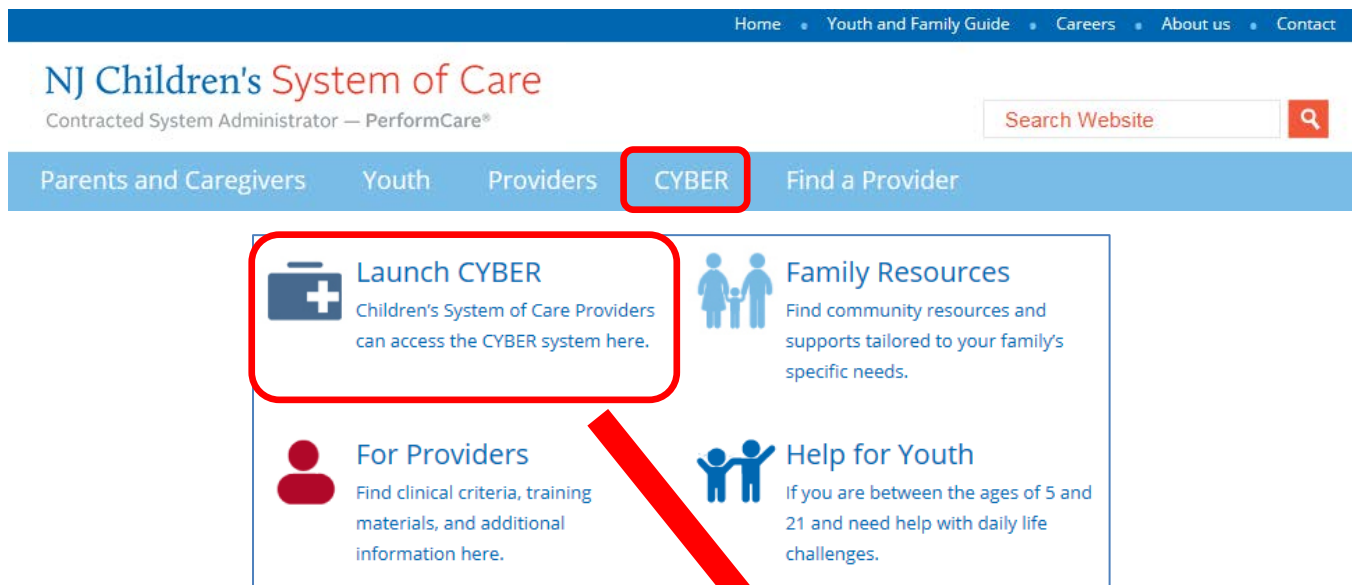
Each provider organization has at least one CYBER Security Administrator, and your agency's CYBER Security Administrator can set up a login for you.

Your access will be based on your login type and security levels.

Before you log in, keep in mind…

- There is no 'back button' use in CYBER!
- Most areas/buttons are single-click – do not double-click on a button!
- Every time you launch CYBER, **you will be required to enter your Username and Password and click the LOGIN button to continue**.

Below the log in area is a statement that, as a CYBER user, you acknowledge your responsibility to protect the privacy of, and to guard against, the inappropriate use of the Protected Health Information (PHI) contained within the system.

This statement will appear each time you log in.

Please also check the **Providers** section on the PerformCare website for the most up-to-date technical requirements (such as browser compatibility and operating systems) that a user would need to access CYBER.

III. Welcome Page Components

Every Welcome Page contains some of the same functionality; these functions are the same across security access levels.
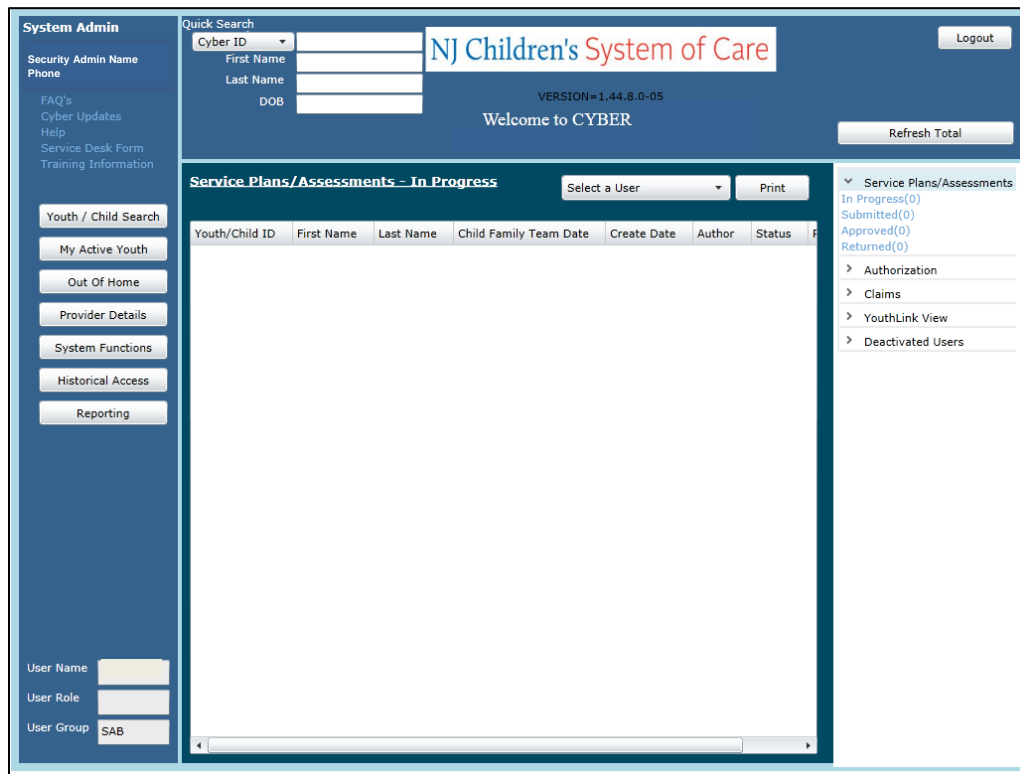
A. Quick Search

The Welcome Page will include a **Quick Search** area, which is located at the top of the screen. Users can enter any combination of information to find a youth's CYBER record; it is recommended that users enter partial names and then click Enter to search.

Users cannot search for a youth who is not open to the agency. If a user attempts to do so, a message will appear.

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B. Help Links

The information in the upper-left hand corner begins with the agency's Security Administrator's name and contact number. This user can reset passwords, assign and adjust security levels, set-up new accounts and deactivate the accounts of users who are no longer with the agency. The hyperlinks below, in blue, will bring up helpful information in a new window when clicked.

- FAQ's – opens the CYBER Frequently Asked Questions posted on the page of the PerformCare website
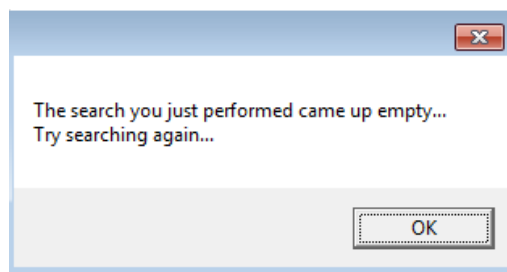- CYBER Updates – opens the New CYBER Releases page of the PerformCare website where the Release Notes are displayed
- Help – displays the Help window with the Service Desk phone and email information
- Service Desk Form – opens the Service Desk Request form on the PerformCare website. Users can complete it to send an email to the Service Desk instead of making a phone call or exiting from the CYBER screen
- Training Information – will bring the user to the training page of the PerformCare website

C. Welcome Page Buttons

On the left hand side of the Welcome Page, there is a column of push buttons:
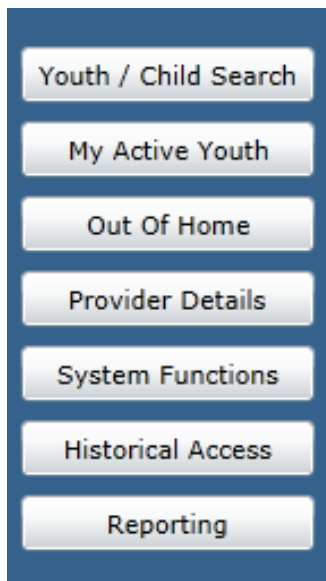
Youth/Child Search – opens the Youth/Child Search screen, an additional search option

My Active Youth – opens a new window that lists youth that the user is opened to on the youth's Provider Tab. This button will only work if the agency assigns users to youth using the Provider Tab (see Using the Provider Tab of the Face Sheet)

Out of Home – opens YouthLink, only available to Substance use Out-of-Home providers

Provider Details – opens the Provider Details screen containing lists of Medicaid and non-Medicaid providers, Provider Information Forms (PIF) and the Annex A Addendum

System Functions – for non-Security Administrators, this will open the Manage Access area where they can change their own password. For Security Administrators, this will open the Manage Access area where they can add new User IDs, edit security settings, deactivate users, etc. (See References for related trainings)

Historical Access – opens a list of youth that have been discharged from the agency

Reporting – opens the Reports screen and only accessible by users that have Level 3 security.
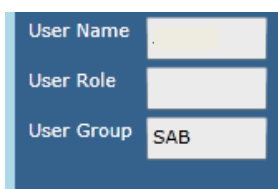
The information in the lower left-hand corner identifies the user's CYBER ID and security levels. Changes to security can be made to this information by the agency's Security Administrator.

The right-side of the page includes a column of links. Each has a parenthesis after the title that will (initially) be blank. To populate this area with numbers, which will show the user how many items are under that category, the user will need to click on the Refresh button at the top of the list.

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D. Welcome Page Links

The Welcome Page links are a set of five accordions with multiple links under each accordion. When a blue hyperlink is clicked, the center grid will populate with the associated data. By default, the Service Plans/Assessments 'In Progress' grid will load each time the user returns to the Welcome Page.
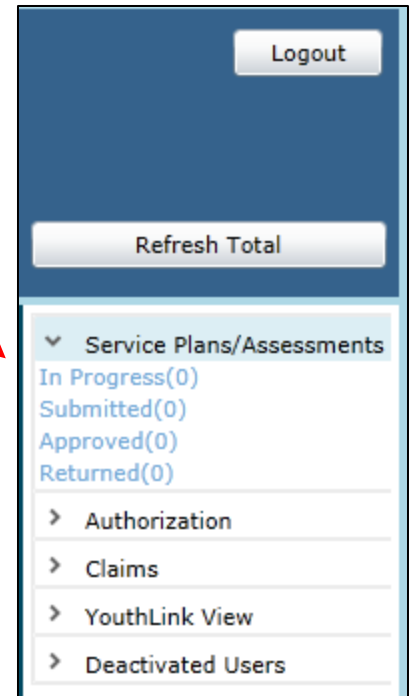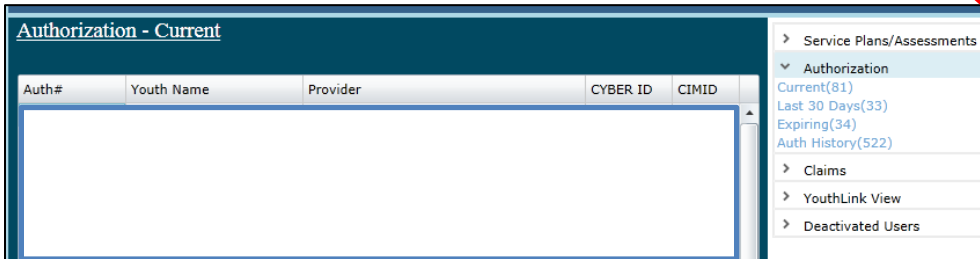
The five accordions on the right-side of the page are defined as follows:

Service Plans/Assessments

In Progress – those plans/assessments and LOCI documents the logged in user has in draft
Users will be able to determine the type of document that is in draft by checking the last column in the grid – Plan Type
Submitted – the plans/assessments submitted to PerformCare for youth in the user's active agency youth list
Approved – a list of the plans/assessments that have been approved in the last 7 days for the youth that are on the logged in user's My Active Youth
Returned – a list of the plans/assessments that have been returned for youth in the user's active agency youth list

Each link in the Service Plans/Assessments grid will include the following column headings:
- Youth/Child ID – acts as a hyperlink; when clicked, the user is brought to the Treatment Plans/Assessments screen in the youth's record
- First Name and Last Name of the Youth
- Child Family Team Date (as entered in the plan/assessment)
- Create Date
- Author
- Status – In progress, Submitted, Returned
- Plan Type – Routine, Transition, Discharge Treatment Plan, BPS Assessment, Strength and Needs Assessment (SNA), LOCI (will only appear in the 'In Progress' grid)

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Authorization - overall view of authorizations without having to access each youth record individually

Current – lists all authorizations for that agency where the current date falls *on or between* the start/end dates of the authorization
Last 30 Days – lists all authorizations for that agency that *have* expired in the last 30 calendar days
Expiring – list all authorizations for that agency that *will* expire in the next 30 calendar days
Auth History – lists all authorizations for that agency that have expired *between 31 and 365* calendar days from the current date

Each link in the Authorization grid will include the following column headings:

- Auth# - the blue hyperlinks on the authorizations, when clicked, will display the Authorization Details screen

  - o The Authorization Details screen will house a list of claims that have been submitted against the authorization; this area will not be functional for most Substance Use treatment providers. If your agency is submitting 1500 forms for enhancement services through CYBER, claims may be created here.
- Youth Name – listed first name and then last name
- Provider – displays authorizations for all programs open to the user
- CYBER ID – the youth's unique number in CYBER
- CIMID – the provider's unique number for each program
- Amount – the total amount of the authorization
- Amount Remaining – total amount remaining for the authorization
- Units – total number of units for the authorization
- Units Remaining – number of units that have not been billed against
- Service Code – the specific code for the service
- Service Description – a description of the service
- Start Date – the start date of the authorization
- End Date – the end date of the authorization
- Create Date – the date the authorization was created

Claims - Will list data for the logged in user's agency; this area will only display information for those agencies that submit 1500 forms for enhancement services

Claims – list of all claims

In Progress – all claims with a status of "In Progress". These are claims that are not submitted.

Submitted – all claims with a status of "Submitted". These claims have been submitted to PerformCare.

Approved – all claims that have been approved by PerformCare

Sent – claims that have been sent for payment after approval with PerformCare

Paid – all claims from the last 365 calendar days that have been paid

Returned – all claims with a status of "Returned". These claims will require review and resubmission.

Denied – all claims with a status of "Denied". These claims cannot be resubmitted.

Review – all claims currently in review with PerformCare prior to approval

CSOC Review – all claims currently in review with CSOC

All Claims grids have a search feature that allows the user to search on multiple pieces of entered information: Each link in the Claims grid includes a list of claims entered by the provider with the following headings:

- CLAIM# - a hyperlink of the number assigned to the specific CMS 1500 form in CYBER. When clicked, the claim opens.
- Provider – the provider name
- Units – total number of units billed in the specific claim
- Amount – dollar amount for the units listed
- CYBER ID – youth's unique ID number in CYBER
- Youth Name
- Auth# – the authorization number billed in the claim. When the hyperlink is clicked, the Authorization Details screen opens listing all claims under that Authorization.
- Service Code – the code for the specific service
- Service Description – a description of the service
- Start Date – the start date of the authorization
- End Date – the end date of the authorization
- Status – status of the claim, (see Claims statuses above)
- Check# - if available
- Check Date – date of the processed check
- Created Date – date the claim was created
- Created By – the CYBER ID of the user who created the claim
- CIMID – the CYBER CIMID number of the program

YouthLink View – for Residential Treatment Centers (RTC) Co-Occurring Behavioral Health (BH)/Substance Use (SU) providers only. This area will display data for any programs the logged in user is attached to in CYBER:

New to Provider Queue – a list of referrals added to the programs' Provider Queue(s) for RTC/Co-Occurring BH/SU Providers only in the last 3 calendar days

Accepted – a list of the referrals in Accepted status (set by the provider)
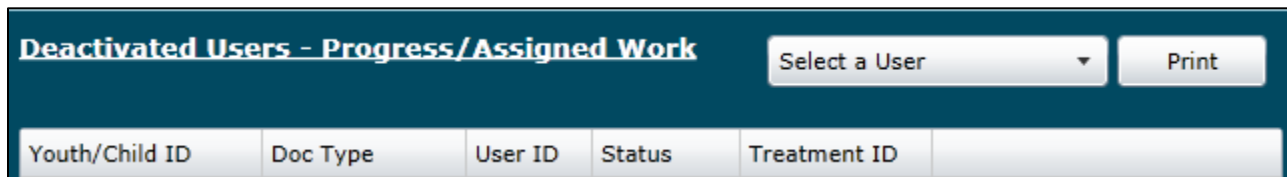
Scheduled – a list of the referrals in Scheduled status (set by the provider)

Recently Admitted – a list of the youth that were admitted into Substance Use OOH program(s) in the last 3 business days

Each link in the YouthLink View grid contains the following information:

- Site Name – program name
- Youth/Child ID - youth's unique ID number in CYBER
- First and Last Name of the youth
- IOS – intensity of Service as it appears on the youth's referral
- Days on YouthLink – number of days the youth's referral has been posted
- Post Date – the original date the referral was posted on YouthLink

Deactivated Users

Progress/Assigned Work – items in this grid are returned or unsubmitted assessments or plans that were created by users who are now deactivated. For Supervisor (SUP) security group and above, this link displays information to allow users to address the assigned work. The user must go to the Plan Approval screen to reassign and address any assessment or treatment plan listed.

The Deactivated Users Link grid contains the following information:

- Youth/Child ID - youth's unique ID number in CYBER
- Doc Type – identifies which plan or assessment type (Treatment – SAB)
- User ID – the CYBER Login Name of the deactivated user
- Status – the status of the plan or assessment (returned, in-progress)
- Treatment ID – the unique number identifying the plan or assessment

Addressing Deactivated User Assigned Work

After reviewing the Deactivated User accordion, in order to address and reassign returned and/or unsubmitted assessments or plans created and left behind by deactivated users, the Manager or Supervisor with Plan Level 2 or Plan Level 3 should go to the Plan Approval screen.

From the Welcome Page, the user should click the Youth/Child Search button at the top of the left side column and then the Plan Approval button will appear in the column. When clicked, by default, the Plan Approval screen opens blank and only populates with information based on selections made. When a user is deactivated, in the Plan Approval screen under the Assigned To drop down, their Name and User ID will have the word Deactivated in parenthesis.
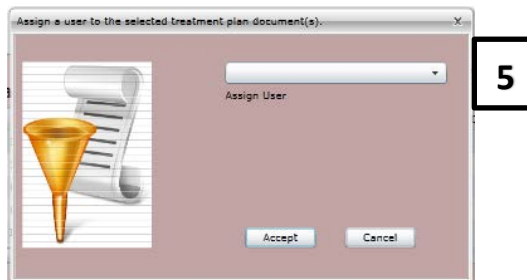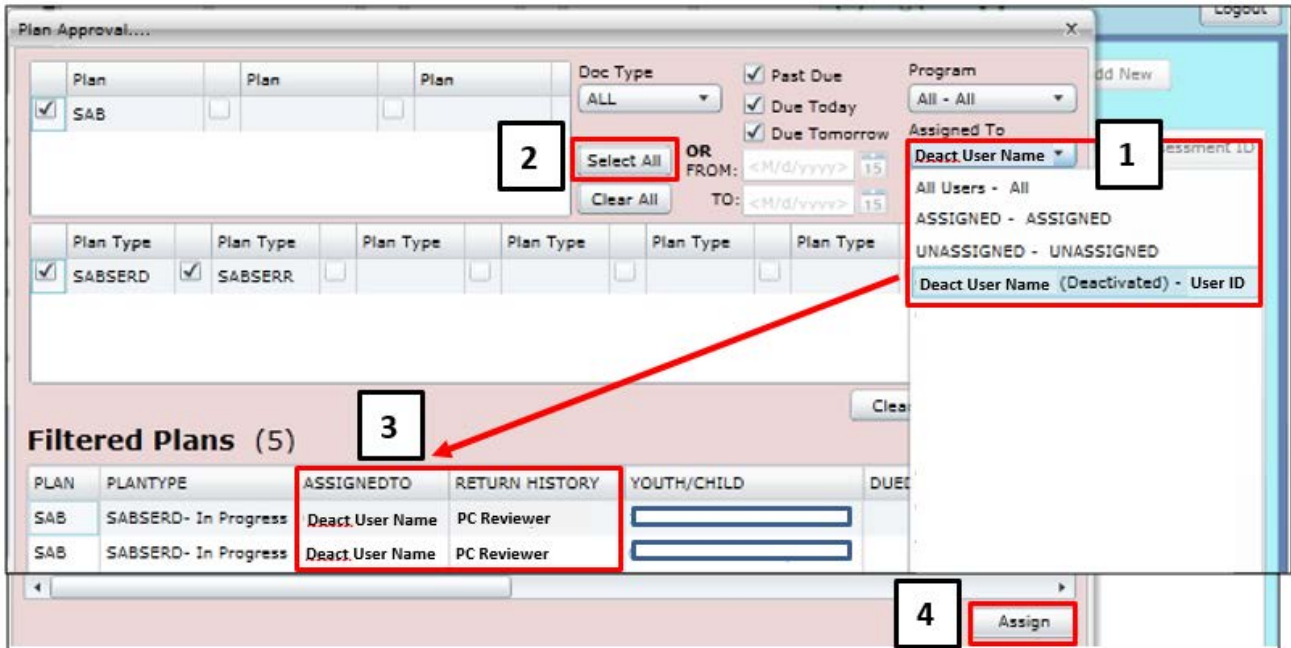
1. In the **Assigned To** drop down, select the Deactivated User Name from the list of all user names.

Note: If the user only sees their own name in the Assigned To drop down, then they have Plan Level 1 security and cannot assign plans to others, only themselves.

2. The Plan grid will display options to select. Click the **Select All** button in the center of the top section.

3. All the Plans/Assessments will be displayed in the **Filtered Plans** box in the center of the screen.
4. Click <u>once</u> on the identified row of the document in the Filtered Plans and then click the **Assign** button.
5. Select the name of a user who will review the document. Click Accept.

The document will show the selected user in the Assigned To column of the Filtered Plans.


Deactivated users will remain on the Assigned To drop down until all of the In Progress/ Assigned work is no longer attached to the user

V. Welcome Page Hierarchy

There are two functions available on the Welcome Page that are driven by the security settings within a user's profile. In order to change the security in a profile, users must contact their Security Administrator or the Service Desk.

Users that are designated Director (DIR/CE), Finance (FIN) or Manager (MGR) will have the ability to pull data for users designated as Supervisor (SUP). SUP users will have the ability to look at data from other SUP users, as well as those designated Case Managers (WOR). WOR users will only have access to their own Welcome Page data.

To access this information, the user will utilize the pull-down menu that is above the center-page grid.
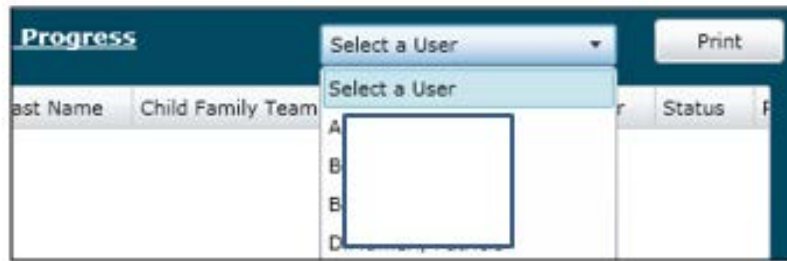
Selecting a user from the menu populates the links on the right-side of the page, and the associated grids, *with the data from the selected user's Welcome Page*; this allows a Manager or Supervisor to monitor the work of staff and identify areas that may need immediate attention such as expiring authorizations or plans/assessments that have been sitting in draft (In Progress) status for an extended period of time.

Users with a designation of Supervisor, Manager or higher (QA, FIN, etc.) will also be able to see a list of outstanding work that is attached to any deactivated users that fall below them in hierarchy; a user's CYBER access can be deactivated by the agency's Security Administrator via Manage Access (see References). The Deactivated Users accordion on the Welcome Page is available to these users and will allow them to see what documents are still in progress.

VI. Using the Provider Tab of the Face Sheet

When the user's program has an open Tracking Element in a youth's record, which allows the agency access to the record to complete actions such as add assessments and treatment plans, users will also have the ability to utilize the Provider Tab.
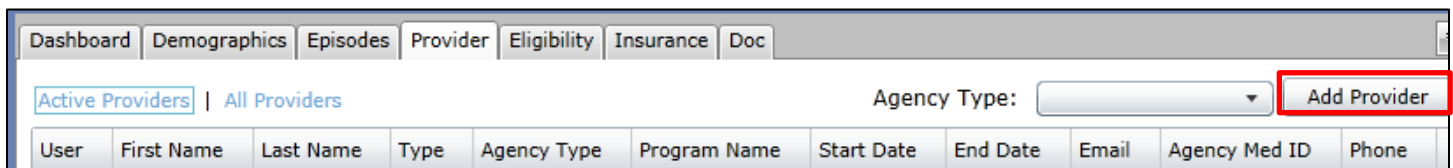
Adding users within the agency to this tab allows for the use of the "Active Agency Youth" button that is on the Welcome Page and can also be accessed from within a youth's record. This button shows the logged-in user a list of the youth that they are assigned, or opened, to; this allows for quick access to a record without having to search through the list of all youth the agency is opened to. Being added to the Provider tab will also assist users in tracking information on their Welcome Page; any treatment plans or assessments that are submitted for a youth that is on a user's My Active Youth will appear on the Welcome Page as Submitted, Approved, Returned, etc.

Clicking the "Add Provider" button will bring up a new window, in which the user can select the appropriate individuals and Program to open the record to.

Users must select a name from the drop-down menu; only users from the logged-in user's agency programs will appear in the list. Users must then enter a Start Date and an End Date is optional. Clicking "Accept" will enter that individual into the Provider tab for the youth's record and the youth will then appear on the user's My Active Youth.

VII. References

Link to the Substance Use trainings: http://www.performcarenj.org/provider/training.aspx#su

Additional trainings may be found on the PerformCare Website Training page:
http://www.performcarenj.org/provider/training.aspx

- o Security section:
  - Instructional Guide for Security Administrators:
    http://www.performcarenj.org/pdf/provider/training/security/role-based-security-system-admin.pdf
- o General section:
  - CYBER Overview – Training for New Providers:
    http://www.performcarenj.org/pdf/provider/training/general-csoc/cyber-overview-training-presentation.pdf
  - My Active Youth:
    http://www.performcarenj.org/pdf/provider/training/family-support-organizations/cyber-overview-my-active-youth.pdf
  - Provider Details:
    http://www.performcarenj.org/pdf/provider/training/general-csoc/instruction-guide-provider-details.pdf
  - Important Contact Information:
    http://www.performcarenj.org/pdf/provider/training/general-csoc/important-contact-information-for-csoc-providers.pdf

PerformCare Customer Service

www.performcarenj.org/ServiceDesk

1-877-652-7624